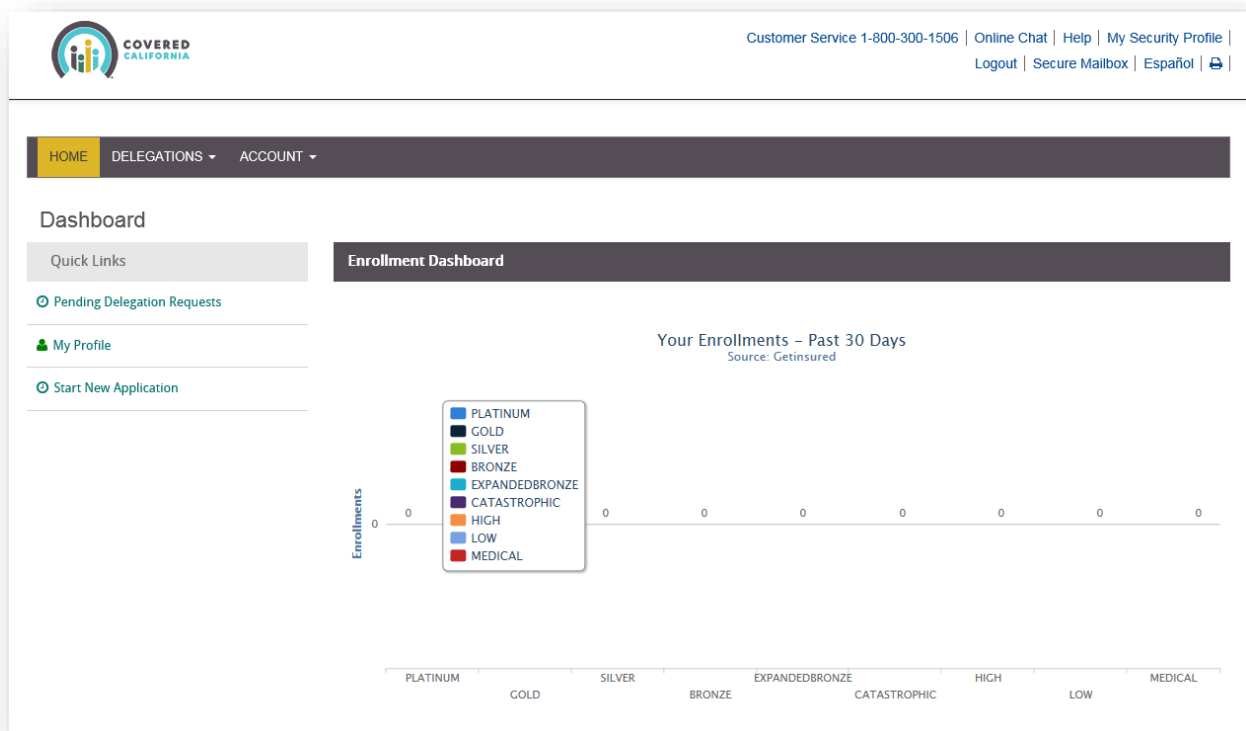


Overview

Certified Enrollment Partners (Certified Enrollment and Application Counselors) act in an operational role for their Entity. Partners must ensure they complete the necessary steps and trainings to become certified with Covered California in order to gain access to their portal. The portal is the single point of entry to begin and manage consumer applications with Covered California.

What you need to know

Partners will log into their CalHEERS account and see an Enroller Portal landing page, shown below.



Enroller Dashboard Navigation

The navigation bar at the top of the portal has three menu columns:

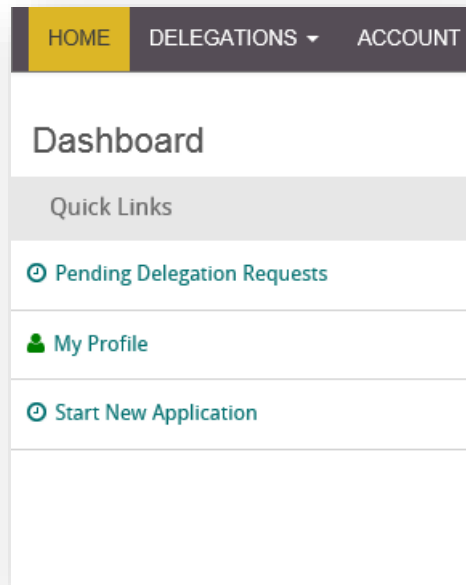
- 1) **Home**- Upon click, the Partner is navigated back to the dashboard homepage
- 2) **Delegations** – Where Partners go to manage their delegations
- 3) **Account** – Where Partners can go to manage their Account Information

Certified Enrollment Partners can also visit the “My Security Profile” link in the upper right hand corner to update their password, email address, etc.

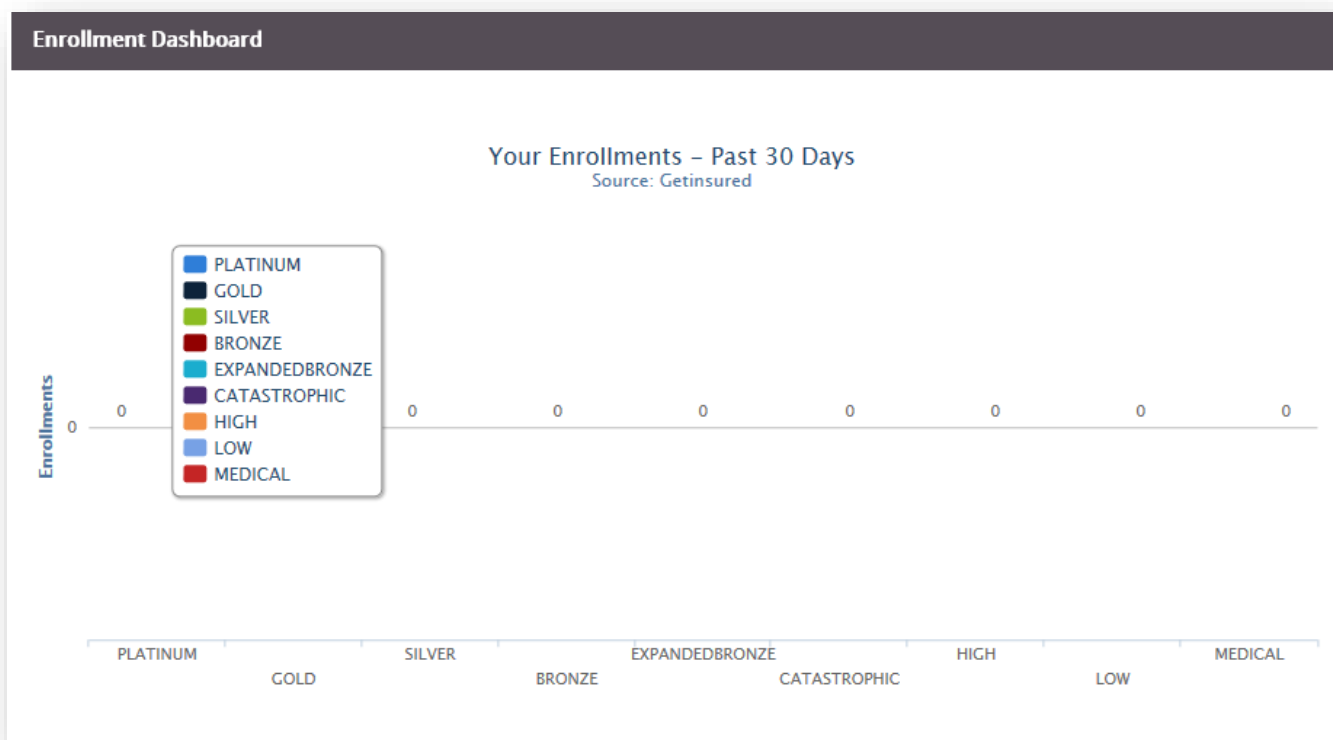
The left of the dashboard has Quick Links, intended to assist Partners with accessing sections within their portal quickly.

They are able to access:

- **Pending Delegation Requests**
- **My Profile**
- **Start a New Application**



The Certified Enroller Portal landing page also has an Enrollment Dashboard that provides a visual summation of the Plan tiers that they have enrolled consumers in within the past 30 days.

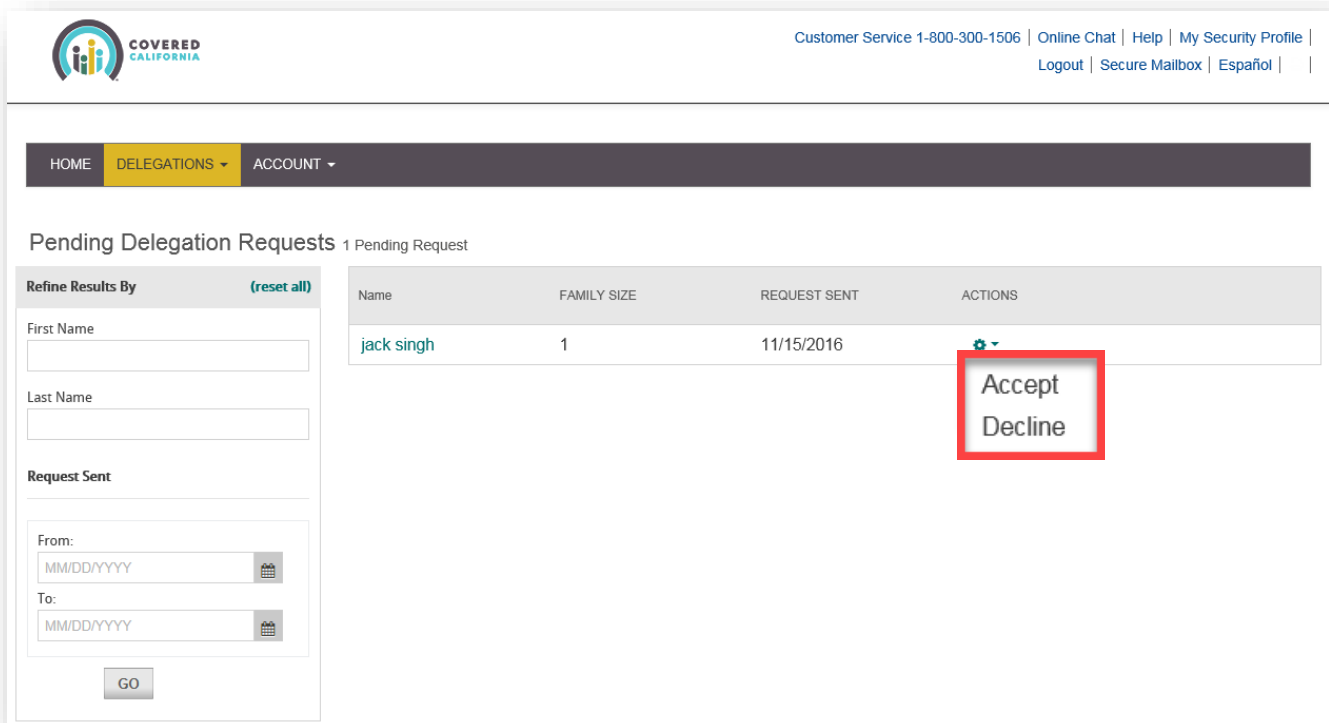


Delegations Tab

Pending Delegations

The Certified Partner can select “Pending Delegations” link to accept or decline pending delegations on behalf of counselors within their Entity.

If they select “Decline”, the counselor will not have access to the consumer’s case and the Counselor will lose the delegation.



The screenshot shows the 'Pending Delegation Requests' section of the CalHEERS Enroller Portal. The interface includes a navigation bar with 'HOME', 'DELEGATIONS', and 'ACCOUNT' tabs. The 'DELEGATIONS' tab is active. Below the navigation bar, the title 'Pending Delegation Requests' is followed by '1 Pending Request'. On the left, there is a 'Refine Results By' sidebar with fields for 'First Name', 'Last Name', and 'Request Sent' (with 'From' and 'To' date pickers). A 'GO' button is at the bottom of the sidebar. The main area displays a table with the following data:

Name	FAMILY SIZE	REQUEST SENT	ACTIONS
jack singh	1	11/15/2016	<div> Accept Decline </div>

The 'Accept' and 'Decline' buttons in the 'ACTIONS' column are highlighted with a red box.

Active Consumer List

The Active Consumer list contains a comprehensive list of all consumers delegated to the Partner. The list contains:

- **Household** – The Name of the Primary Contact, Phone Number, Email and Address
- **Case** – Case Number for the consumer account
- **Coverage** – Plan information

HOME
DELEGATIONS
ACCOUNT

Active Consumers

The Active Consumer List displays up to 2000 consumers. If you have more than 2000 active consumers, use the Search Filters for more results.

Q Search

First Name

Last Name

Application Type

Select Application Type

Issuer

Select Issuer

Current Status

Select Current Status

Next Steps

None

Enrollment Status

Select Enrollment Status

Application Year

Select Year

GO

Sort by: First Name A-Z

[Export Book of Business](#)

#	HOUSEHOLD	CASE	COVERAGE
1	INDCECAPPDAD INDCECAPPDAD <div> Phone: Email: Address: Fresno CA 93703 </div>	Case ID: 500C <div> Application Year: Current Status: Application Not Started Next Steps: </div>	
Account Household Eligibility Mark As Inactive			
2	INDCECAPPDAD INDCECAPPDAD <div> Phone: Email: </div>	Case ID: 5000005538 <div> Application Year: Current Status: Application Not Started </div>	

The Partner can also utilize the search function at the top to locate a specific consumer by:


- **Name**
- **Application Type**
- **Issuer**
- **Current Status**
- **Next Steps**
- **Enrollment Status**
- **Application Year**

Inactive Delegations

The Inactive Consumers page will display any consumer delegation that has been marked inactive whom the Partner no longer has access to.

It will display:

- **Consumer Name**
- **Inactive Since Date**



[Customer Service 1-800-300-1506](#) |
 [Online Chat](#) |
 [Help](#) |
 [My Security Profile](#) |
 [Logout](#) |
 [Secure Mailbox](#) |
 [Español](#)

[HOME](#)
[DELEGATIONS](#)
[ACCOUNT](#)

Pending Delegation Requests

4 InActive Requests

Refine Results By [\(reset all\)](#)

First Name

Last Name

Inactive Since

From:

To:

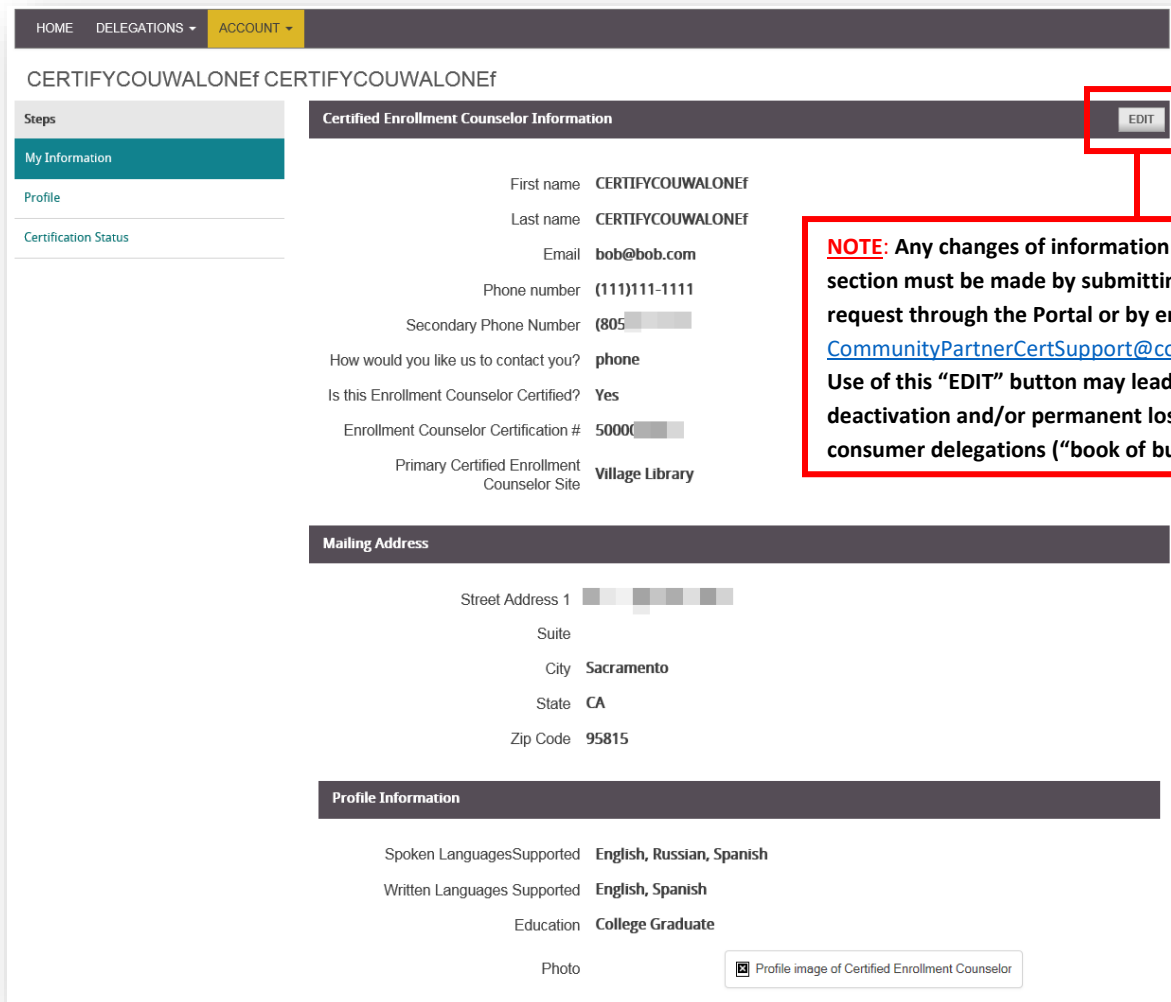
GO

Name	Inactive Since
JOE Enrolled	02/01/2017
UNSUB Term	02/01/2017
JOHN Enrolled	02/01/2017
MARY Tester	02/02/2017

Account Tab

Certified Enrollment Counselor Information

The information on the *Certified Enrollment Counselor Information* page displays what was entered by the Certification Services Team at Covered California for the Partner during onboarding.



HOME DELEGATIONS **ACCOUNT**

CERTIFYCOUWALONEf CERTIFYCOUWALONEf

Steps

My Information

Profile

Certification Status

Certified Enrollment Counselor Information EDIT

First name CERTIFYCOUWALONEf

Last name CERTIFYCOUWALONEf

Email bob@bob.com

Phone number (111)111-1111

Secondary Phone Number (805) [redacted]

How would you like us to contact you? phone

Is this Enrollment Counselor Certified? Yes

Enrollment Counselor Certification # 5000 [redacted]

Primary Certified Enrollment Counselor Site Village Library

Mailing Address

Street Address 1 [redacted]

Suite [redacted]

City Sacramento

State CA

Zip Code 95815

Profile Information

Spoken LanguagesSupported English, Russian, Spanish

Written Languages Supported English, Spanish

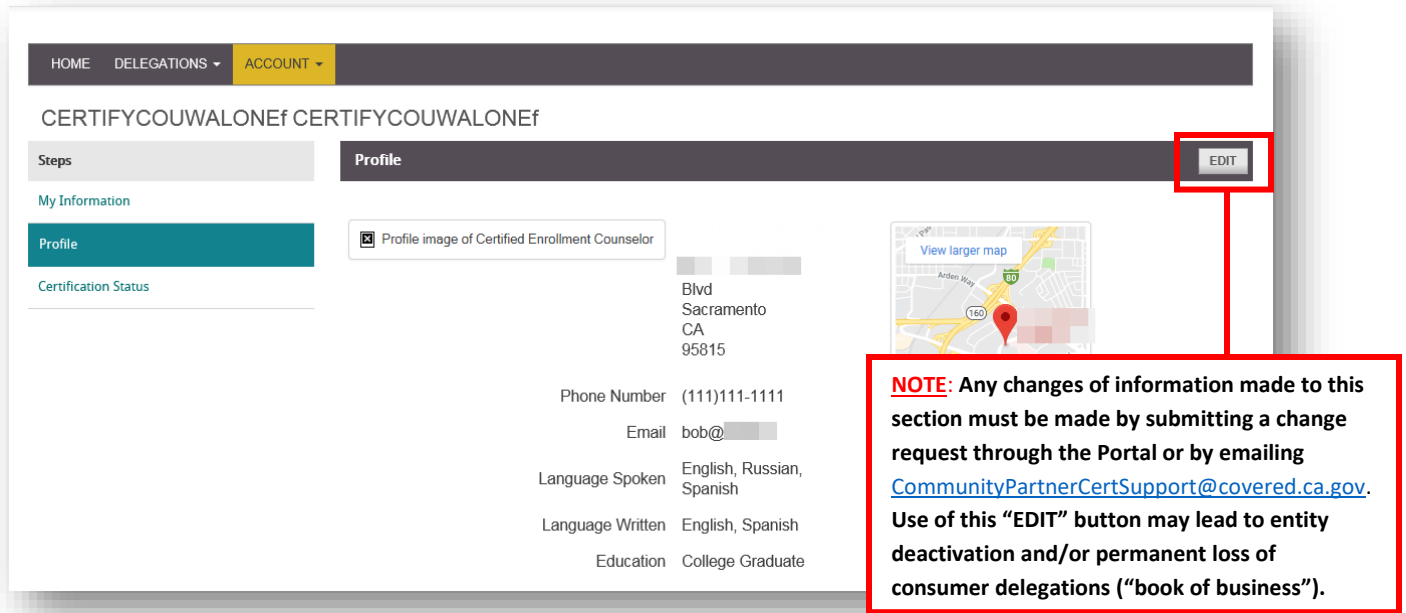
Education College Graduate

Photo ☐ Profile image of Certified Enrollment Counselor

NOTE: Any changes of information made to this section must be made by submitting a change request through the Portal or by emailing CommunityPartnerCertSupport@covered.ca.gov. Use of this "EDIT" button may lead to entity deactivation and/or permanent loss of consumer delegations ("book of business").

Profile

The Profile page displays the contact information for the Partner.



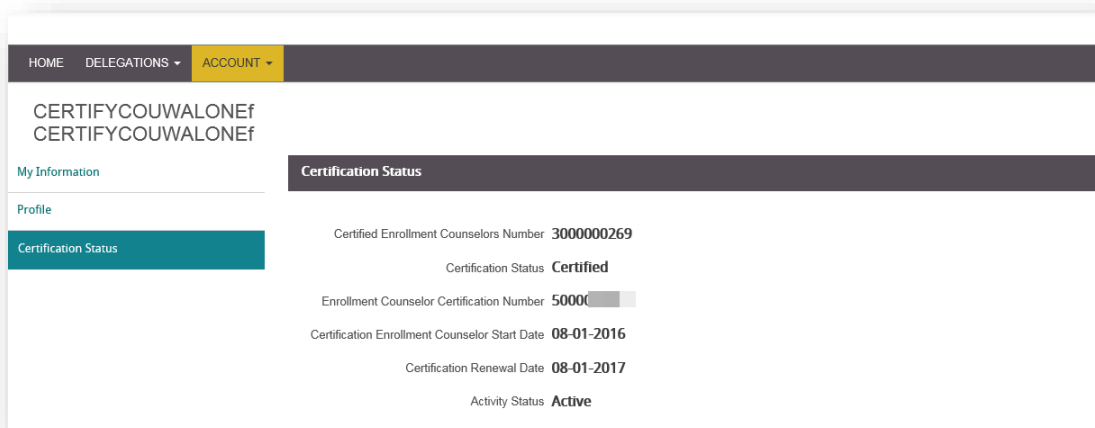
NOTE: Any changes of information made to this section must be made by submitting a change request through the Portal or by emailing CommunityPartnerCertSupport@covered.ca.gov. Use of this "EDIT" button may lead to entity deactivation and/or permanent loss of consumer delegations ("book of business").

Please Note: The information listed in the *Address Field* is not what populates in Find Local Help. The Partner location is set on the *Certified Enrollment Counselor Information* page via the "Primary Certified Enrollment Counselor Site" drop down. If the site desired is not listed, please contact your *Entity Primary Contact* to have the site added to the list.

Certification Status

The **Certification Status** page displays information regarding the Partner's status with the Entity and Covered California:

- **Certified Enrollment Counselor Number**
- **Status**
- **Enrollment Counselor Certification Number**
- **Certification Enrollment Counselor Start Date**
- **Registration Renewal Date**
- **Activity Status**



Certified Enrollment Counselors Number 3000000269

Certification Status **Certified**

Enrollment Counselor Certification Number 50000

Certification Enrollment Counselor Start Date 08-01-2016

Certification Renewal Date 08-01-2017

Activity Status **Active**